

How to Set up Your Property

EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the results to identify underperforming buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

Setting up your property is quick and easy with Portfolio Manager. There are two ways to set up your property or properties in your portfolio.

- ✓ Set up your property manually.
- ✓ Upload your property information using spreadsheet templates (creating multiple properties at once and updating default property use details).

Setting up Your Property Manually

To get started, log into Portfolio Manager at www.energystar.gov/portfoliomanager. Then, follow these instructions to set up your property.

1. Click **Add a Property** on the **MyPortfolio** tab.
2. Select your primary Property Type, the number of buildings, and your Property’s construction status.
NOTE: While all property types can be benchmarked, not all property types are eligible to get an ENERGY STAR Score or apply for ENERGY STAR certification. A full list of eligible property types can be found in the [ENERGY STAR Buildings FAQs](#).
3. Click **Get Started!**
4. Enter basic property information. At the bottom of each page, Portfolio Manager ask questions specific to the primary property type selected. Select the boxes next to the statements that apply to your property. Then click **Continue**.
5. Enter Use Details for your primary property use. Use details with blue stars are required. If necessary, you can use default or temporary values at this time and

Property Types

All property types can be benchmarked. For properties with multiple buildings, only hospitals, hotels, K-12 schools, multifamily, and senior care communities are eligible to receive the 1 – 100 ENERGY STAR score. Additional information on campuses can be found in the [ENERGY STAR Buildings FAQs](#).

Properties with Multiple Use Types

Only break out separate property use types if they meet one of the following criteria:

1. The Property Use can get an ENERGY STAR Score. (Note: Retail can only get a score if it meets certain requirements, including that it is more than 5,000 sq ft.).
2. It accounts for more than 25% of the property's GFA.
3. It is a vacant/unoccupied Office or Medical Office (and the vacancy is greater than 10% of the property's GFA).
4. The Weekly Hours differ by more than 10% for the same Property Type AND that Property Type can get a score (ex: you have two Office tenants, and their hours differ by more than 10%).

Otherwise, simply include their square footage with the building’s primary use.

enter more accurate data later. Additional property use types can also be added at this point (see sidebar for discussion of when to break out a separate property use type). **NOTE:** Mouse over the name of any Use Detail to see a definition.

- Click **Add Property**. When you have successfully added your property, you will see the property's **Summary** tab.
- This property has now been added to your portfolio and can be accessed from the **MyPortfolio** tab.



Gross Floor Area

When entering different Building Use Types, be sure that the total square footage for all use types, excluding parking, adds up to equal the entire property Gross Floor Area entered previously. Otherwise, you will get an error message.

Using Spreadsheet Uploads

Adding Properties

- Log into [Portfolio Manager](#). In your **MyPortfolio** tab, select **Upload and/or update multiple properties at once** from the Manage Portfolio menu on the bottom left of the page.
- Click on **Add Properties Template** on the right-hand side of the page.
- Save the spreadsheet file that loads in your browser, and then open it to enter your property information. Be sure to read the Instructions tab before starting. When you are finished entering information, save the spreadsheet to your computer. **NOTE:** Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.
- When you're ready to upload this file, go back to the **Upload and/or Update Multiple Properties** page (where you originally generated the spreadsheet).
- Select **Add New Properties** for each type of Upload.
- Browse to the completed template saved on your computer, click **Open**, and then click **Upload**. **NOTE:** This template uses default values for all property use details. To use non-default values, you will need to use the "Update Property Use Details". Instructions on how to use this template can be found in the next section of this document.
- The **My Spreadsheet Uploads** section will appear on the page, so you can view the status of your upload. If the upload fails, you can click on **View Errors** to see what changes need to be made. Once the errors are corrected you can reupload the spreadsheet.
- Your file will have a status of **Success** if it has been uploaded.
- You can now view the added properties in the **MyPortfolio** tab.

	A	B	C	D
	Property Name (Required)	Street Address (Required)	Street Address 2 (Optional)	City/Municipality (Required)
1				
2	Jones Elementary School	1234 Test Rd		Atlanta
3	Fredrick Office	9382 Peach Ct		Atlanta
4	Independence Hotel	1283 Orange St		Washington D.C.
5	Silver Creek Apartments	9483 Silver Creek St.		Washington D.C.
6				
7				

My Spreadsheet Uploads

The following spreadsheets have been uploaded to Portfolio Manager. Depending on the size of your spreadsheet, completing the upload to your portfolio may take a while.

<input type="checkbox"/>	File Name	Type of Upload	Date	Status
<input type="checkbox"/>	Add_Properties_en (1).xlsx	New Property	6/25/2019 11:51 AM	Failed View Errors
<input type="checkbox"/>	Add_Properties_en (1).xlsx	New Property	6/25/2019 11:48 AM	Success

[Delete Selected Entries](#)

Updating Default Property Use Details

1. Go to your **MyPortfolio** tab.
2. Click on **Upload and/or update multiple properties** on the bottom left-hand side.
3. Click on **Create an Upload Template** on the right-hand side.
4. Select **Update Use Details for Existing Properties**.
5. Select the number of property or properties you would like to update and the information you would like to update.
6. Click **Create & Download Template**.

Create a Custom Upload Template

If you want to add property use or meter information for multiple properties, you can do this by using an Excel spreadsheet. First tell us some information about what you are trying to upload to Portfolio Manager so we can create a spreadsheet template for you to use. Then simply fill it in with your information and upload it!

1 Select the Task You are Performing

- ☐ Add Meters to Existing Properties
- ☐ Add Bills to Existing Meters (i.e., meter consumption information)
- ☐ Update Use Details for Existing Properties (e.g. Weekly Hours of Operation, Number of Workers, etc.)
- ☒ Edit Basic Property Information for Existing Properties (such as name and address)

2 Select Properties to Include

Properties:

Select Number of Property(ies)

☐ One Property
☐ Multiple Properties
☐ All Properties
☐ Properties in a Group

& Download Template

Cancel

Warning - Don't Change Columns!

In order for your upload to work you cannot Add, Delete or Re-Order columns in the custom spreadsheet. We create the template based on your data, and we need a specific format in order for your upload to succeed.

Creating New Properties?

If you need to add new properties, you do not need to create a custom upload template. You can add new properties [manually](#) or by using the [Add Property Excel Template](#).

Save the spreadsheet file that loads in your browser, and then open it to enter your property information. Be sure to read the Instructions tab before starting. For each property use detail that was entered as a default upon initial property creation, you will need to provide the correct, accurate value.

NOTE: Since Portfolio Manager treats this process as an “update,” you will need to change the “Current As of Date” for each updated use detail to be one day later than the date currently specified. When you are finished entering the updates for your properties, save the spreadsheet.

	E	F	G	H	I	J	K	L	M
	Use Name (Pre-filled)	Gross Floor Area (Value)		Gross Floor Area Current As of Date		Use a Default for Weekly Operating Hours ?	Weekly Operating Hours (Value)	Weekly Operating Hours Current As of Date	Is Weekly Operating Hours temporary?
1			GFA Units		Is Gross Floor Area temporary?				
2	Main Office	80,000	Sq. Ft.	01/01/2000	No	Yes	65	01/01/2000	No
3	Main Office	80,000	Sq. Ft.	01/01/2000	No	No	40	1/2/2000	No
4									
5									
6									

7. When you’re ready to upload this file, go back to the **Upload and/or Update Multiple Properties** page (where you originally generated the spreadsheet).
8. Select **Update Use Details for Existing Properties** as your Type of Upload.
9. Browse to the completed template you saved on your computer, click **Open**, and then click **Upload**.
10. The **My Spreadsheet Uploads** section will appear on the page, so you can view the status of your upload. If the upload fails, you can click on **View Errors** to see what changes need to be made. Once the errors are corrected you can reupload the spreadsheet.
11. Your file will have a status of **Success** if it has been uploaded.
12. You can now view the updates to your property(ies) in the **MyPortfolio** tab.

Learn More!

To learn more about Portfolio Manager, visit www.energystar.gov/portfoliomanager.

To get answers to your questions, visit www.energystar.gov/buildingshelp.